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# USERS' HANDBOOK

# STATEWIDE CONTRACT



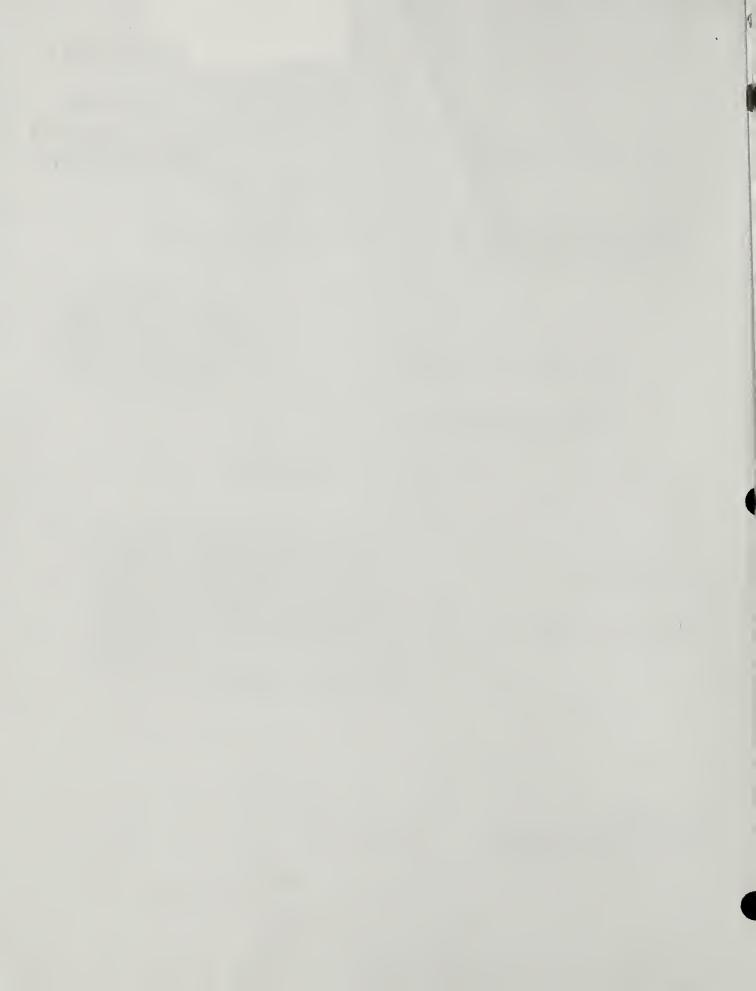
## **FOR**

# TRAVEL SERVICES





Contract Number: ST7B01A Contract Term: 3/1/96 - 3/7/97 Cheryl Traina, Professional Services Procurement Team Leader Operational Services Division 617/727-7500 ext. 207



Dear State Employee,

This travel users' handbook contains general guidelines and procedures to assist you with your business travel arrangements and/or personal vacation plans. A table of contents is included to simplify your search for pertinent information.

Omega World Travel and O.T.&T. Travel Management are the two authorized travel agents for Commonwealth travelers. Our business relationship with them will enable us to take full advantage of the savings opportunities they can offer us through their global bargaining power as large regional agencies. Each agent is committed to providing excellent customer service to all employees of the Commonwealth.

The travel services contract (ST7B01A) has been designed to provide you with hassle-free, safe, economical, and enjoyable travel. Your authorized travel coordinator will receive updated information regarding this contract, as it becomes available (either from the Operational Services Division and/or the authorized travel agents). Please remember, you must adhere to the internal control procedures of your employer. This handbook is not intended to replace internal controls, but to enhance your understanding of this new contract.

Best wishes for safe and enjoyable travel!

Sincerely,

Cheryl Traina

Travel Services Contract Manager

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- Travel Authorization Form and Instructions
- Statement of Reconciliation
- Traveler Profile

#### TRAVEL AGENT INFORMATION

Agent:

Omega World Travel

Address:

1 Lewis Wharf, Boston, MA 02110

Hours:

8:00am - 6:00pm

Phone:

617/720-5546 / 800/777-7279 (dedicated Commonwealth line)

Fax:

617/557-4515

After Hours:

800/964-6342 (when calling you must add: Boston: WC14+your three character alpha

MMARS code / Westover: W4EV + your three character alpha MMARS code)

Internet:

http://www.omegaworld.com

Vendor code:

042-803-649-0004

Contacts:

Christine Lacy, Service Director Maureen Delia, Operations Manager

Felix Lena, Lead Agent

Jim Cole, Carol Parslow, Back-up Agents

Agent:

Omega Western Region Office

Address:

Westover Air Reserve Base

439LSSQ LGTT Bldg., 5375, Chicopee, MA 01022-1530

Hours: Phone: 7:30am - 4:15pm 413/593-3993 413/593-9684

Fax:

042-803-649-0004

Internet:

Vendor Code:

http://www.omegaworld.com

Contacts:

Jim Jourdain, Manager

Kate Fitzgibbon, Agent

#### O.T.&T. TRAVEL MANAGEMENT

Agent:

O.T. & T. Travel Management

Address:

57 John F. Kennedy Street, Cambridge, MA 02138

Hours:

8:00am - 5:00pm

Phone:

617/492-8822 (dedicated Commonwealth line)

800/822-1771 (in MA) / 888/222-0288 (outside MA)

After Hours:

800/343-5032 (when calling add X1VO + your three character alpha MMARS code)

Fax: Email: 617/547-5115 or 888/878-8872

Vendor Code:

ott@harvard.edu 023-207-694-0000 Joseph Tse, President

Contacts:

Scott Hinley, Operations Manager Stephanie Bassett, Supervisor

Leslie Herdt, Consultant



#### ELIGIBLE CONTRACT USERS (the "CLIENT")

- All agencies of the Commonwealth, including all constitutional offices, the legislature, and the judiciary;
- Cities, towns, municipalities, counties, and other political subdivisions of the Commonwealth, including schools and other service districts;
- Authorities, commissions, institutions of higher education, and quasi-public agencies established for the benefit of the citizens of the Commonwealth;
- Other eligible entities that may be from time to time designated in writing by the State Purchasing Agent

In addition, Commonwealth employees and their families may take advantage of vacation programs (leisure travel discounts) available through the travel agents. However, such travel is not endorsed by the Commonwealth and all vacation arrangements made are between the traveler and the travel agent(s).

NOTE: In accordance with the provisions of our new procurement reform laws (801 CMR 21.00), there are no waivers for vendors used outside of a statewide contract.

	PROMPT PAY D	ISCOUNTS
TRAVEL AGENT	DISCOUNT	NET DAYS
Omega	1.5%	10
	1.0%	15
	5 0.5%	20
·	0.3%	30
7. 	0.1%	45
OT&T	0.5%	10
	0.4%	15
	0.3%	20
	0.1%	30

#### REFUNDS / CREDITS / CANCELLATIONS

Clients may obtain credit for unused tickets. The travel agents will identify each refund by original ticket number and issue date, traveler name, and agency account number. Fares which are canceled and returned by Monday (if issued the previous week), will be refunded at no charge or penalty. Lost or stolen tickets must be reported immediately!

Refunds must be processed within five (5) business days from the time the travel agents receive exchanged tickets, canceled tickets, and/or downgrade tickets. *Unless cash is paid for a fare or rate, the travel agent will not provide any traveler with a cash refund on tickets purchased for official government travel under this contract.* 

#### **RESERVATION PROCEDURES**

(billing is provided for airline reservations only)



Authorized personnel<sup>1</sup> contact travel agent during business hours (please refer to "Travel Agent Information", page 1, for normal business hours and after hours/emergency information), with the following pertinent travel information

- name of the traveler
- traveler's cost center & Department/Organization code - MMARS three letter code and your four digit organization number, i.e., OSD 3000 (Federal program number if applicable and required by your Department when making travel reservations).
- departure date / approximate departure time
- origin/destination
- traveler's flexibility, special needs/requests
- preferences for car rental and/or hotel (if applicable)



NOTE: Each client's travel policies will be stored in the travel agents' reservation system. To have individual traveler profiles stored on the system, and appended to individual traveler's confidential reservation records, employees must complete a "Traveler Profile" (a sample has been included in this handbook). Reservations may also be made via "fax on demand service" (please contact travel agent for profile forms and further information).



Travel agent reviews details of booking, quote rate, restrictions, and ticket delivery (date/time) with individual making reservations. Travel agent then forwards a printed copy of same to traveler.



Traveler uses quoted information to obtain travel approval and notifies travel agent. Travel agent books the trip at the lowest possible rate and locks in the rate ("book rate"). Traveler may be notified of any change between quote and book rate. Travel agents' systems re-check booking criteria/records for new lower fares until the day of departure, at which time new tickets may be re-issued.

NOTE: A credit card is usually necessary to reserve hotel accommodations, and must be provided by the client.



Travel agent notifies traveler of cancellations, special taxes, delays, transfers, layovers, etc.

NOTE: Travel agents will provide information on how to achieve maximum savings on total travel costs. This includes, but is not limited to, a weekend night stay over, conference discounts, use of alternative airports, car and lodging discounts, etc. Charter discounts, group, and other applicable special fares, for groups of three or more, will be offered if available and less expensive than available individual fares. (Check your internal policies & contracts regarding issues such as weekend night stay overs and meal reimbursements).

<sup>&</sup>lt;sup>1</sup> Unless notified to the contrary, the travel agent may only accept travel arrangements from the Chief Financial Officer (CFO). If your authorized personnel include employees other than the CFO, you must provide a list of said employees to the travel agent.

#### Reservation Procedures, cont'd.



Tickets and other appropriate travel documents are delivered via mail courier and/or overnight delivery services. Emergency ticket delivery methods (i.e., prepaid tickets) are dependent upon Departmental internal control procedures and must be used on a limited basis.

NOTE: The travel agent assumes all standard delivery costs. Tickets will be provided no less than forty-eight (48) hours prior to departure and for emergencies, within two (2) hours (or as determined by the client). "Ticketless" travel may be used. See details on page 15 of this handbook.



Any problems should be directed to the applicable travel agent (see "Travel Agent Information" on page 1 for appropriate account manager information).

NOTE: If a client experiences problems with a travel agent, he/she should attempt to reconcile their differences with the travel agent prior to contacting the OSD contract manager. Problems brought before the contract manager must be accompanied by all applicable paperwork (i.e., itineraries, tickets, faxes, letters, etc.), and must be forwarded by the client's authorized travel coordinator.

#### PAYMENT INFORMATION

PO/PV

A purchase order (PO) or a payment voucher (PV) are used to process payments/reimbursements for travel related expenses. Object codes used include BO1, BB1, B1B and BO2.

**TAF** 

A "Travel Authorization Form", TAF, (which replaces the old "AF5" form), must be completed prior to all out-of-

state travel. In addition, if your actual travel expenses substantially exceed your estimated expenses (submitted on the original TAF), you must submit a "Statement of Reconciliation" form within five (5) business days of your return (please refer to page 18 for form & instructions)

RECEIPTS

Original receipts, with dates, should accompany your payment and/or reimbursement requests, i.e., an itemized hotel bill, the completed car rental contract and the airline passenger receipt. If you use a personal credit card and no receipt is provided by the vendor you should attach your copy of the merchant's charge record.

Requests for payment/reimbursement which contain items that do not comply with Commonwealth requirements, and/or items requiring additional substantiation, will be returned for correction and resubmission.



# .....TRAVEL NOTES and REMINDERS......

Purchasing travel can be confusing and time consuming, because airlines, hotels, and car rental companies offer many different prices for similar services.

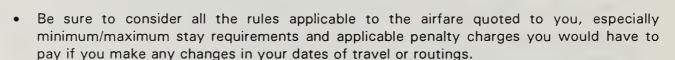
For example, on any given day, there are over one hundred different airfares available between Boston and Los Angeles and over two hundred airfare choices between Boston and London.

By using the highly skilled professional travel planners at Omega and O.T.&T., Commonwealth employees will be sure to receive the best advice for selecting appropriate, cost-effective travel services.

This section contains information which will assist you in working with the travel agents to book air travel, lodging, and/or vehicle rentals.

#### AIR TRAVEL

 Book your economy-class reservations as far in advance as possible!



• Check convenient satellite airports for lower fares (i.e., Chicago bound travelers planning to rent a car at their destination sometimes find lower fares by flying to Midway or Milwaukee instead of O'Hare).

#### MAKING CHANGES

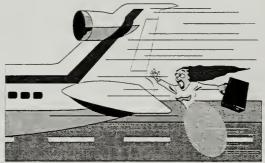
Changing most airline tickets, in any way, usually takes time and costs money. Some tickets cannot be changed at all because they are non-refundable and/or non-endorseable to another airline. You will save time and money if you travel with the same airline as ticketed and travel with the original ticket.

If you must change your ticket before you begin your trip, call the travel agent immediately. It may be possible to void your ticket. Changes after travel has begun should be made by calling the travel agent, or by calling the airline holding your existing reservations.

Unused airline tickets should be returned directly to the travel agent. Call travel agent for pick-up. DO NOT MAIL UNUSED TICKETS!!!

#### OTHER REMINDERS

- Due to increased security procedures at all airports, you should allow plenty of extra time for check in and possible questions regarding your luggage.
- Have a photo identification available!
- Preferred seating is not always possible due to various airport controls and procedures.
   Book early!
- There is no State tax on air travel (Federal taxes and passenger facility fees may apply).
   Please do not deduct State tax from your payments to the travel agents.
- Frequent flyer points if a trip is purchased or reimbursed with government funds, frequent flyer miles may only be used for official government travel.



#### LODGING

When travel is authorized by the Commonwealth, your accommodation should meet standard needs for comfort and safety and be appropriate for the effective conduct of business.



Substantial savings on lodging are available to Commonwealth travelers at many hotels and motels across the United States and around the world. Our travel agents have lodging directories listing corporate rates at hundreds of properties in many locations. These rates are available to you as an employee of the Commonwealth. They are especially attractive if you must travel to a major metropolitan area during the business week, when few, if any, discounts normally apply. The travel agents can also quote lower weekend and other promotional rates at many of these same locations. Remember to inquire, at the time of booking, about the availability and any *special identification requirements* at individual properties.

#### MAKING RESERVATIONS

Reservations for lodging can be made by calling the travel agent and requesting that accommodations be booked with a "6:00 p.m. hold" or "guaranteed for late arrival". (Reminder, you usually need a credit card to make hotel reservations). When you are sure you will arrive at your

place of lodging early in with a "6:00 p.m." hold not need the room, call directly, no later than you cannot reach a



the day, make your reservation If your plans change and you do the travel agent or the property 4:00 p.m. to cancel it. Even if phone to cancel, the reservation

will be released to another guest by 6:00 p.m.

When you want your room held for "guaranteed late arrival", your credit card will guarantee your reservation. If you arrive at the place of lodging late in the evening, the room should be available. If you cannot reach a phone to cancel your reservation, it will not be released to another guest and you will be charged for the room.

No-show charges on guaranteed lodging reservations are the responsibility of the traveler and are seldom reversed by the lodging establishment or your charge card company.

#### **CANCELLATIONS**

The following guidelines will lessen the chances of disputed charges for unneeded lodging reservations:

- Call the travel agent or the property directly if your travel plans change.
- Keep a record of the reservation and cancellation information. When making a reservation, note the name and telephone number of the place of lodging, the confirmation number of the reservation, the date the reservation was made, and the full name of the person making the reservation. Record the same information when you cancel a reservation and be sure to note the reservation cancellation number. Always inquire about the deadlines for canceling reservations. The industry standard is 4:00 p.m., but resort and convention hotels sometimes have different policies.

## ARRIVAL & DEPARTURE

At check-in, verify that the rate you were quoted when your reservation was confirmed is the rate being charged.

 If your reservation was guaranteed and the hotel is sold-out, you should receive similar accommodations at another property at no additional cost to you.



- Ask about the availability of a rate lower than the one you were quoted.
- State tax on lodging varies from State to State, and must be paid; unless your employer has a tax exempt number from the State where the lodging is located.
- Always verify every item on your bill, PRIOR to leaving the property!

#### CAR RENTAL

A rental car is a reasonable means of travel when other forms of transportation are unavailable, more costly, or impractical. In New York City and other large urban areas, however, taxis and airport limousines are usually more convenient and cost less than rental cars. Most travelers attending conferences in airport hotels can save money by relying on free airport and/or in-town shuttles.



#### RENTAL REMINDERS

- You will need a credit card in order to book a car rental for out-of-state travel (for in-state travel, you should contact the Office of Vehicle Management, OVM, 617/727-8844 or 1-800/671-8900).
- Some car rental companies require a clean driving record. If your RMV check shows
  recent speeding tickets, you may be denied a rental. For information on companies
  requiring clean records, check with the travel agent prior to booking.



- Save money by filling up the gas tank before you return your rental car.
- Save money by planning your trips and not paying for car rental days you don't need. For example, if you arrive at your destination airport at 4:00pm and leave the next day at 6:00pm, you could end up paying a day's rental for those two extra hours.
- It is not necessary to purchase separate liability insurance on a rental car for out-of-state travel.

#### TRAVEL AGENT SERVICES

Each travel agent will provide a full range of travel advice and services which include, but are not limited to:

- ♦ Airfare Discount Programs
- Hotel (lodging) Discount Programs, Directories, Maps
- Car Rental Discount Programs
- Rail Service Programs
- ♦ Bus Programs
- ♦ Fare/Price Guarantees
- International Travel Services & Discounts
- Foreign Language Services
- ◆ Internet Access (Omega)
- ♦ Health Requirements & Advice
- Document Assistance for Foreign Travel (passports, tourist cards, visas, etc.)
- Seminar & Meeting Arrangements (client space, lodging, transportation)
- Drivers (for Cabinet & Executive level or trade mission travel)
- VIP Services (special visitors to Commonwealth, trade missions, Cabinet level travel)
- Weather Information; Travel Advisories



- Foreign Exchange Rates
- ♦ Entertainment Options
- Vacation Discounts and Tour Packages
- Baggage Tracer Service (Omega)
- ◆ Ship Service Programs & Information
- Travel Management Reporting



#### QUESTIONS AND ANSWERS

The following are responses to questions which have been forwarded to the OSD travel services contract manager:

#### PAYMENT/AUTHORIZATION ISSUES

- Q: Do we use a service contract (SC), a purchase order (PO), or a payment voucher (PV) for payment of travel related expenses?
- A: PO or PV. Object codes used may include B01, BB1, B1B, and B02.
- Q: Where is the new AF5 form?
- A: There is no more "AF5 form". A copy of the new "Travel Authorization Form" (TAF) has been included in this handbook. See your travel coordinator if you require additional copies.
- Q: Is a travel authorization form necessary for in-state travel?
- A: No. While the use of the TAF is recommended for all travel, it is required for <u>all</u> out-of-state travel.
- Q: Would an employee need a travel authorization form if he/she inadvertently traveled out-of-state while performing emergency response conditions?
- A: Yes. Departments should complete a blanket travel authorization form for employees who may have bona fide out-of-state emergencies. This blanket TAF must have secretariat approval (or other appropriate source) and must be accompanied by adequate documentation.
- Q: What is the purpose of a TAF?
- A: Purposes include, but are not limited to: travel approval, budgetary approval, employee indemnification, avoidance of conflict of interest issues, and management awareness of travel plans and expenditures.
- Q: What does "Dept/Orgn" mean on the TAF?
- A: "Dept/Orgn" refers to the traveler's Departmental MMARS three-letter code and four-digit organization number. All fields on the TAF are clarified within the TAF instructions, which are located on the back of the TAF form.
- Q: What if we have Federal reporting requirements?
- A: For Departments using Federal funds to travel, and requiring Federal program codes on TAFs, please contact the travel agents directly and let them know.

Q: When do I use the "Statement of Reconciliation Form"?

A:

A: Employees complete the "Statement of Reconciliation Form" when the subsidized portion of their travel substantially exceeds the authorized amount (original TAF figures).



Q: Why should we care about payment discounts when government fares over \$50 have a 10% discount already?

The automatic 10% discount from all published and governmental fares over \$50 (indicated in the computerized reservation system < CRS> code "MS10"), is no longer available as the pre-determined nationwide cap for this discount has been reached.

#### RESERVATION ISSUES

- Q: Do I have to use Omega or OT & T for in-state and out-of-state travel arrangements?
- A: Yes, if you are traveling on authorized State business. However, for in-State vehicle needs, you should contact the Office of Vehicle Management, OVM, at 617/727-8844 or 1-800/671-8900.
- Q: Can we use a travel agent outside of the contract if said company offers a lower rate?
- A: No. Both travel agents guarantee lowest air fare and must (by contract) provide the lowest applicable airfare, lodging rate, car rental rate, etc. If you feel this is not happening be sure, first of all, that you are comparing apples to apples ("booked rate" to "booked rate" not "booked rate" to "quote rate"). Also, the itinerary for the differing quotes or rates should be the same.

All things being equal, you should forward a copy of the itinerary from the non-approved travel agent to the approved travel agent(s). Upon receipt, if a discrepancy truly exists, the travel agents guarantee as follows:

- Omega will refund the difference and apply a \$25 credit toward the client's account. If an employee has used their own credit card, a refund check will be issued to the employee and the employee's CFO will be notified.
- O.T.& T. will refund, in full, the difference between the price of the ticket and the actual lowest fare, within 30 days.

No complaints should be forwarded to the OSD contract manager until you have made efforts to resolve the matter with the travel agent. In addition, if a complaint is forwarded, it should be in writing (email is fine), accompanied by copies of applicable itineraries or other pertinent information.

- Q: Is the CFO the only individual authorized to make travel reservations for a Department?
- A: Yes, unless the CFO has forwarded a list of additional authorized individuals to the travel agents.

#### USERS ISSUES

- Q: Are contract employees obligated to use our travel agents?
- A: No.
- Q: At what rate do we reimburse contract employees for travel?
- A: A contract employee may not be reimbursed for travel expenses unless such provisions were included in their contract. The rates for reimbursement are dependent upon the terms of the contract employee's contract.
- Q: At what rate do we reimburse State employees for travel expenses?
- A: Union State employees and Technical Pay Employees (TPL) are reimbursed according to negotiated collective bargaining rates. Please refer to applicable union contracts for specifics. For additional information, speak with your Personnel Director, or contact the Human Resources Division at 617/727-3777.

Management and confidential employees are reimbursed according to the current rules of the Human Resources Division. For additional information, please speak with your Personnel Director or contact the Human Resources Division at 617/727-3777.



Q: May eligible users use this contract for personal travel?

Yes. Eligible users (please refer to list on page 3) may take advantage of leisure travel discounts. However, the Commonwealth does not sponsor these offerings. They are offered directly by the travel agent. All services provided under these arrangements are between the traveler and the travel agent. Vacation specials (flyers) may be faxed to interested parties.

Please contact the travel agents for additional information.

A:

- Q: Are State employees protected (by insurance) for injuries incurred while traveling?
- A: Yes, provided the travel is authorized. For specifics regarding liability issues, please contact your Legal Department.
- Q: May a traveler retain the frequent flyer miles earned on a business trip?
- A: Yes. However, if the trip was purchased or reimbursed with government funds, the frequent flyer miles may only be used for official government travel.

#### What is Electronic Ticketing?

Electronic Ticketing (ET) is a new method of documenting the sale and tracking usage of passenger transportation without requiring the issuance of a paper ticket.

# What are the benefits of Electronic Ticketing?

Electronic Ticketing provides a "stress-free" method of ticketing for customers, i.e., there is no worry about ticket delivery or remembering to bring the ticket to the airport. There is no ticket to lose, misplace or have stolen, which eliminates fees for ticket replacement.

#### How it works:

Once you have made your reservation and purchased your seat, your receipt/ itinerary card/legal notices will be sent by mail. A duplicate copy is available upon request at the airport. The receipt/itinerary card/legal notices is not required for travel.

## Are advance boarding authority documents available?

A boarding authority document will be provided at the airport on the day of travel.

#### Can seats still be assigned in advance?

Yes. Your seat will be held until 15 minutes before departure.

#### What do customers bring to the airport?

A photo ID and in some cases the credit card used for purchasing the ET.

# Where can the customer obtain a boarding authority document?

There are opportunities at many different points throughout the airport: curbside, ticket counter, flight information counter, Crown Room Club and gate.

# Customers are used to having a ticket in hand. How will they be assured they have a reservation?

Delta's new combined receipt/itinerary card identifies a confirmed reservation just like a typical paper flight coupon.

# How will an ET customer ask for a refund when there is no paper ticket?

The customer will need to present positive photo ID at a Delta ticketing location. The Delta representative will print the ET and process the refund using current procedures for a paper ticket.

#### Future Enhancements

- Future enhancements will allow customers to receive a reissue or refund an electronic ticket over the phone.
- Development of electronic travel agent ticketing is underway and will be available in the future.

# SIMPLIFIED May 1996



Cape Air 1-800-352-0714 Colgan Air 1-800-272-5488 Continental 1-800-525-0280

1-800-644-3592 Myrtle Beach 1-800-386-2786 Spirit Airlines 1-800-772-7117

**Fastwind Airlines** 

USAir Shuttle (LaGuardia, N.Y. only) 1-800-428-4322 Valujet 1-800-825-8538

B

America West 1-800-235-9292 American (except int'l arrivals) 1-800-433-7300 American Eagle 1-800-433-7300 Delta Shuttle (LaGuardia, N.Y. only) 1-800-221-1212 Midway Airlines 1-800-446-4392 Midwest Express 1-800-452-2022 Qantas 1-800-227-4500

USAir/USAir Express (except Trans-Atlantic arrivals) 1-800-428-4322 Virgin Atlantic Airways (departures only) 1-800-862-8621

C

Business Express/ Delta Connection 1-800-345-3400 Delta Air Lines 1-800-221-1212 Nations Air 1-800-248-9538 Sabena (departures only) 1-800-955-2000 TW Express 1-800-221-2000 TWA (except int'l arrivals) 1-800-221-2000 United/United Express 1-800-241-6522



Alitalia (departures only) 1-800-223-5730 Charters (may use other terminals also)



Aer Lingus 1-800-223-6537 Air Alliance 1-800-776-3000 Air Atlantic Canadian Air 1-800-426-7000 Air Canada 1-800-776-3000 Air Nova 1-800-776-3000 Alitalia (int'l arrivals only) 1-800-223-5730 American (int'l arrivals only) 1-800-433-7300

ATA 1-800-225-2995 British Airways 1-800-247-9297 Icelandair 1-800-223-5500 KLM 1-800-374-7747 Lufthansa 1-800-645-3880 NW Airlink 1-800-225-2525 Northwest 1-800-225-2525 Olympic 1-800-223-1226

Sabena (int'l arrivals only) 1-800-955-2000 Swissair 1-800-221-4750 TAP Air Portugal 1-800-221-7370 TWA (int'l arrivals only) 1-800-221-2000 USAir (Trans-Atlantic arrivals only) 1-800-428-4322 Virgin Atlantic Airways (int'l arrivals only)

1-800-862-8621

Match your airline with your terminal letter. For ground transportation information to and from Logan Airport call 1-800-23-LOGAN (1-800-262-3335 TDD).

#### Logan Airport Ground Transportation

Airport Shuttle Buses / ① Subway To Downtown Boston Shuttle buses provide free service between airline terminals and Airport ② Station on the MBTA Blue Line. Shuttle bus 22 serves Terminals A & B. Shuttle bus 33 serves Terminals C, D, & E. Shuttle bus 11 is for transport between all terminals, but does not stop at Airport ③ Station (Blue Line ⑦ fare is S.85).

#### Airport Handicap Van

Free service between airline terminals. To request service, use the free "Van Phone" in baggage claim areas or call 617-561-1769.

#### Airport Water Shuttle

Water Shuttles run between Logan and downtown Boston (Rowes Wharf). Free "Airport Water Shuttle" buses provide frequent service between the Logan boat dock and all airline terminals.

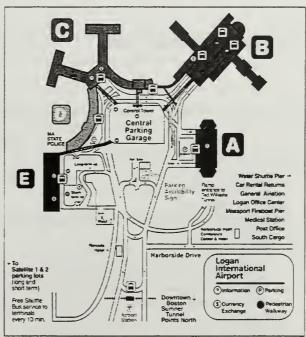
#### On-Call Water Taxi

Burr St. extension.

Personal service is available between the Logan dock and numerous landings in Boston. To request service, call 617-422-0392.

#### Logan Express Buses - Braintree, Framingham & Woburn Frequent daily service is available to and from Logan Airport and:

- Braintree Opposite the South Shore Plaza on Forbes Road, off Route
- 37 South at Route 128/93;
   Framingham Located off the Route 30 side of Shoppers' World on
- Woburn At Exit 36 (Washington Street) off Route 128, next to the Mishawum MBTA Commuter Rail Station on Mishawum Road.





A public service from Massport Communications Department 10 Park Plaza, Boston, MA 02116 Telephone: 617-973-5600

#### **FORMS**

This last section of your handbook includes copies of forms necessary for Commonwealth travel. Included are:

Travel Authorization Form

Statement of Reconciliation

Traveler Profile Form

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	TRAVEL AUTHORIZATION FORM (Form TAP) - INSTRUCTIONS
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3	pursoes. December/Diggson: Insert the name of your dependent and division.
6	<u>Committee</u> Insert traverer's Departmental MIAARS final-seller code and four-dept Organization Number <u>Appropriate Number</u> Insert the appropriation number against which travel purchases are to be encumbered encomment.
4	hismack of Travencia. Lot traveurs of inverses are me some EXCEPT in the case of privately subsidized tre- velors an individual form for each traveler is required.
7	Ifteral, Position/Title of each traveler
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10.	documentation may be attached Extraced Expenses
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	Parameter Funds Indicate the amount of personal funds that ere to be used (required by 801 CMR 7 00)  Taxacomorphic Include this total round-are travel fare for a common center (er har bus, etc.). If use
	personal venicle indicate the rate per mile that is removesable under the resevent provisions of our
	Collective Bergening Agreements for union members or epiticetrie Rules for non-union employees <u>Lodgood</u> , include the total notes and law expenditure. Use more than and are it more than and in property is used.
	<u>Vegical</u> indicate the total nevaturable amount for mean. It is not necessary to break out the indivi- ensuring for each mee. This will be accounted for in effective receipts and departments internet co- procedures.
	The Time type and expense of any anticipated expenses not otherwise harhed, such se telephone calls \$40 Time. Total the dotal expenditure expenses for each time.
	Grand Total: List the grand total for the ting. (The sum of the sup totals for Private Fund, State/Fee Pu Personal Fund and Other Fund.)
29	Partons Accompanying Employee If other parties, including other state employees, are ecompanying the trave state their names at Titles, and Residensing (undersor a personal or business relationaria).
	hor-Business Component of Trave. Expens if personal traver will subset on a included in this this also ill applicable. Supply the nature of the travel. If her applicable check "feet Applicable."
12	formly of share will periodize sum of any the neutral articles of the expension of control control approximate. Providers Conditional Three information. If this this is being is whelloused or premier y subsections in the componee provided, the historization of the priviles perfy subsecting the fitness for off purposes, and expensively their four-control in a wint in the Confinements. If there is not being privilety appeals
	Check "not Applicated" Cartifications and Authorizations. This section has up to three eighebrie resumments
	a) When Traver is privately exceeds ad the Travelor Must the eight the certification
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	iii This respective Cesties Secretary must eight this form inner princesy supersized traver a surfacted. The Case Secretary must step this form if general traver authorization is not Designated to the respective Department cost above;
	a feet common seed
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For additional copies, please speak with your authorized travel services coordinator.



### THE COMMONWEALTH OF MASSACHUSETTS TRAVEL AUTHORIZATION FORM (Form TAF)

Shaded areas must be completed if travel is subsidized by a private party, per 801 CMR 7.00

1. Date of Request:	2. Travel Request #:	3. Department/Divis	partment/Division:		4. DEPT/ORGN:		5. Appropriation No.:	
6. Name of Traveler(s):  7. Title(s):			8. Dates of Travel:					
9. Travel Itinerary and J	ustification (If travel is pri	vately subsidized, stateme	nt of purpose	e must include anti	cipated benefit	t to the Con	mmonwealth and En	nployee.)
Supporting documen	tation, ie. agendas or br	ochures, is attached.						
10 Estimated Function			Private	State/Federal	Personal		Other	
10. Estimated Expenses			Funds	Funds	Funds		Funds	
Transportation: (check a								
Air R	ail 🔲 Bus							
☐ Taxi								
☐ Car: ☐ Sta	te Personal	Rental						
Lodging:								
Meals:								
Other: (please list):								
Sub Total(s)								
				·				
	Gr	and Total						
11. Include names of all non-business component		g family, friends or cov	vorkers) an	d how they will (	pay. In addi	tion, if the	e travel consists o	of a
40 0: 0								
12. Privately Subsidized						ot Applica		
Name of Contact Person	1:		Describe	all activities off	ered and int	ent to par	ticipate:	
Company:								
Address:								
Business Activity:		<del></del>						
Telephone Number:			Kelation	ship Between Pri	vate Party a	nd the Co	immonwealth:	
13. Certifications and A	uthorizations							
I hereby certify under th		nasium, shas, sa sha ha	at af may be	audadaa sha ah	:	i i		
Signature of Traveler:	e pairis and penalties of	perjury that, to the be	st of my kn	owledge, the abi		Date:	s and correct.	
I hereby certify that suff		e for the above describ		ccommodations.	□ Delegation	n from S		
Signature of Department	t Head or Designee:		Title:				Date:	
Approved Di	sapproved Approv	ed With Modifications	- Comm	ents Attached				
Signature of Cabinet Sec	cretary:		-				Date:	
							Duto.	

#### TRAVEL AUTHORIZATION FORM (Form TAF) - INSTRUCTIONS

Travelers should receive fare and rate estimates from the statewide contract travel agents. (See *OSD Update 97-1, Statewide Contract for Travel Services*, for contractor information) If travel is being subsidized, or partially subsidized by a private party, shaded areas must be completed to comply with 801 CMR 7.00. Travel itinerary and other details need only be completed to the extent that each Department's internal control policies are satisfied.

- 1. Date of Request: Date the form is executed by traveler.
- 2. <u>Travel Request #:</u> Departmental Fiscal Officer may insert internal control or sequence number for audit/tracking purposes.
- 3. Department/Division: Insert the name of your department and division.
- 4. DEPT/ORGN: Insert traveler's Departmental MMARS three-letter code and four-digit Organization Number.
- 5. <u>Appropriation Number</u>: Insert the appropriation number against which travel purchases are to be encumbered and expended.
- 6. Name(s) of Traveler(s): List travelers if itineraries are the same, EXCEPT in the case of privately subsidized travel, where an individual form for each traveler is required.
- 7. Title(s): Position/Title of each traveler.
- 8. Dates of Travel: List the dates of travel.
- 9. <u>Travel Itinerary and Justification:</u> The traveler should provide the destination and a brief summary of the trip itinerary. State the sponsoring organization. To comply with 801 CMR 7.00, privately subsidized travel must be for an express benefit for the employee in an official capacity and for the Commonwealth. State what those benefits are. Supporting documentation may be attached.
- 10. Estimated Expenses:

<u>Private Funds</u>: Indicate the total funding for this trip on behalf of the state traveler from a private source pursuant to 801 CMR 7.00.

<u>State/Fed Funds</u>: Indicate the total funds that will be expended by the Department on behalf of the state employee traveler, either in direct payment to a travel service vendor, charge account vendor, or through employee reimbursements.

Personal Funds: Indicate the amount of personal funds that are to be used (required by 801 CMR 7.00).

<u>Transportation</u>: Include the total round-trip travel fare for a common carrier (air, rail bus, etc.). If using a personal vehicle, indicate the rate per mile that is reimbursable under the relevant provisions of current Collective Bargaining Agreements for union members or applicable Rules for non-union employees.

<u>Lodging:</u> Include the total hotel room and tax expenditure. Use more than one line if more than one hotel property is used.

<u>Meals:</u> Indicate the total reimbursable amount for meals. It is not necessary to break out the individual amounts for each meal. This will be accounted for in attached receipts and departmental internal control procedures.

Other: State type and expense of any anticipated expenses not otherwise named, such as telephone calls.

Sub Total: Total the dollar expenditure expected for each line.

<u>Grand Total</u>: List the grand total for the trip. (The sum of the sub totals for Private Fund, State/Fed Fund, Personal Fund and Other Fund.)

- 11. <u>Persons Accompanying Employee:</u> If other parties, including other state employees, are accompanying the traveler, state their name(s), Titles, and Relationship (whether a personal or business relationship).
  - Non-Business Component of Travel: Explain if personal travel will extend or is included in this trip, also if spouse, family, or others will participate, state briefly the nature of the travel. If not applicable, check "Not Applicable."
- 12. <u>Privately Subsidized Travel Information:</u> If this trip is being subsidized or partially subsidized by a private party, describe in the categories provided, the necessary information of the private party subsidizing the travel for official purposes, and explain what their connection is with the Commonwealth. If travel is not being privately subsidized, check "Not Applicable."
- 13. Certifications and Authorizations: This section has up to three signature requirements.
  - a) When Travel is privately subsidized, the Traveler must the sign the certification.
  - b) The Department Head or delegate should check the box indicating that he or she is authorized by the Cabinet Secretary to grant final approval for out-of-state travel, then <u>Approve</u>, <u>Disapprove</u>, or <u>Approve with Modifications</u> the travel request on this form. The Department Head may make changes to the document, or refer to the modifications to be made in the space provided as necessary.
  - c) The respective Cabinet Secretary must sign this form when privately subsidized travel is authorized. The Cabinet Secretary must also sign this form if general travel authorization is not Delegated to the respective Department Head (see above).



#### THE COMMONWEALTH OF MASSACHUSETTS

#### Statement of Reconciliation (Form TAF1)

Shaded areas must be completed if travel is subsidized by a private party, per 801 CMR 7.00

4 0 40	(7			2 2		
1. Date of Reconciliation:	2. Name of Traveler:			3. Date:	s of Travel:	
4 Employee Contification						
Employee Certification:     hereby certify under the pains and pe	nalties of periury that, to the bes	t of my knowl	edge, the following	g statement	is true and co	rrect. Any
significant changes to the original trave						,
Signature of Traveler:						
5. Actual Expenses:		Private	State/Federal	Personal	Other	
_		Funds	Funds	Funds	Funds	
Transportation: (check all that applied)  Air						
☐ Taxi						
Car: State Person	al Rental					
Lodging:	as night —					
nights at \$ pe	er night. =					
Other: (please list):						
Sub Total(s)						
Sub rotal(s)						
	Grand Total					
6. Description of Changes:						
7. Authority Notification:						
Signature of Department Head or Designee:	Title:		Date:			
Signature of Cabinet Secretary:			Date:			

Attach additional documentation as needed. This form must be filed as a business record, but is not to be used as back-up for travel reimbursement. Traveler's supervisor for reimbursement.

#### STATEMENT OF RECONCILIATION (Form TAF-1) - INSTRUCTIONS

Pursuant to 801 CMR 7.04, each traveler for whom travel was subsidized by a private party, must prepare and sign the Statement of Reconciliation (Form TAF-1) within two weeks of travel return if their are significant changes to the estimated expenses or other information on the original Travel Authorization Form (Form TAF). Employees should keep a copy of the completed Travel Authorization Form for this purpose, should the original be unavailable after travel has concluded.

# COMMONWEALTH OF MASSACHUSETTS TRAVELER PROFILE FORM

To expedite the reservation process, please fax complete form to both travel agents; Omega, 617/557-4515 and O.T.&T., 617/547-5115. All information will remain confidential.

Personal Information								
Name to be shown on tickets								
Title								
Comm. Dept	MMARS Code	Organizat	tion Code					
Dept. Address	B	usiness Phone						
Ticket Delivery Address	F:	ax Number						
Home Address	H	Iome Phone						
EMail/Internet Address								
In Emergency Notify	In Emergency Notify Business Phone							
Relationship of Above		Home Phone						
Personal Preferences	Personal Preferences							
Local Airport Preference	Meal Rest	rictions						
Seating: Non-Smoking Smoking	Windo	ow	Aisle					
Hotel Preferences (non-smoking, low floor etc.)								
Car Rental Preferences (1st, 2nd choice) 1		ID N	ımber					
2 ID Num	per							
Class (business use): sub-compact mids	ize full size	luxury_	other					
Class (personal use): sub-compact mids	ize full size	luxury	other					
Special Service Requests								

Frequent Flyer ID Numbers			
American	_	Northwest	
America West		TWA	
Continental	_	United	
Delta		US Air	
Midwest Express	_	Other	
Hotel Membership Numbers:	_		
Personal Travel			
Credit Card Name	Number		Exp
No charges will be made without your auth	norization for each tra	nsaction.	
Authorized Signature			
International Travel Data			
Passport No	Place of Issue	Exp	
Date Issued	Place of Birth	Date of Bird	th
Citizenship	Name as shown on I	Passport	
Visas Held 1. Country	Exp	2. Country	Exp
2. Country	Exp.	3. Country	Exp